



Content Management

For IFAP and Schools Portal



Course Overview

- ↓ **Introduction**
- ↓ **Content Management Basics**
- ↓ **The Content Management Process**
- ↓ **Using Interwoven TeamSite**
- ↓ **Review & Conclusion**



Introduction

 **Welcome to the course**

 **Introductions**

 **Course objectives**

 **Course structure**

- Explanation of concepts
- Demonstrations
- Hands-on lessons



Content Management Basics

Review of Content Management Basics

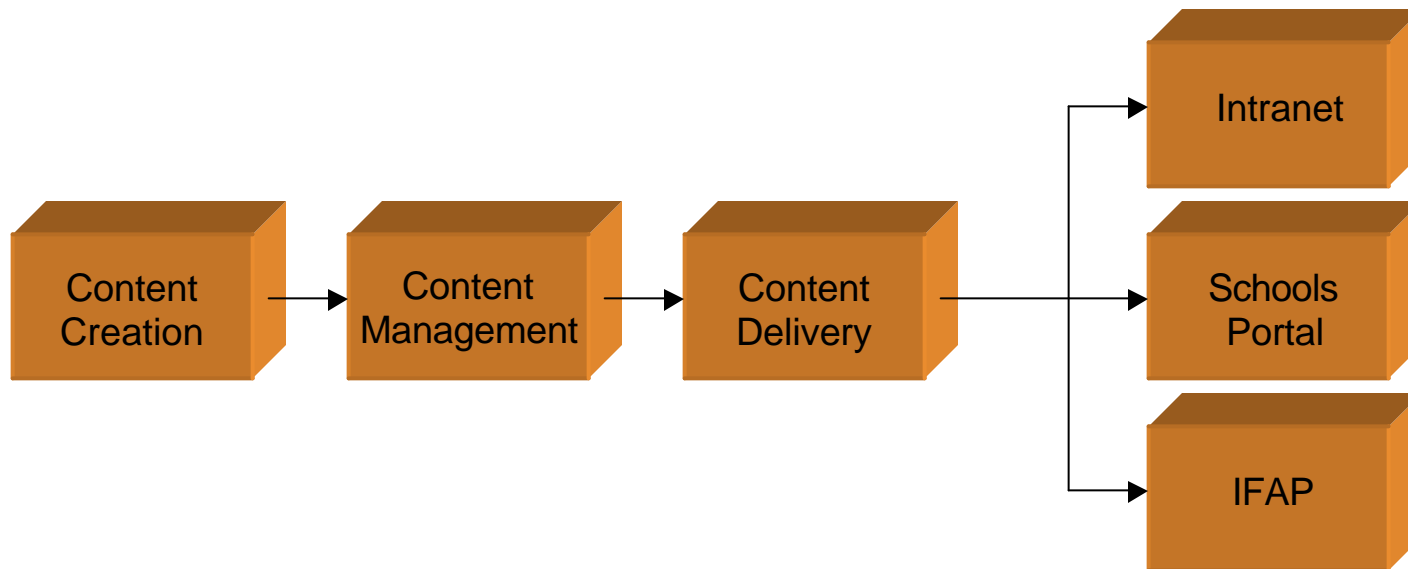
- Content management process
- Content management workflow
- TeamSite structure
- TeamSite roles



Content Management Basics

Process

Basic content management process:

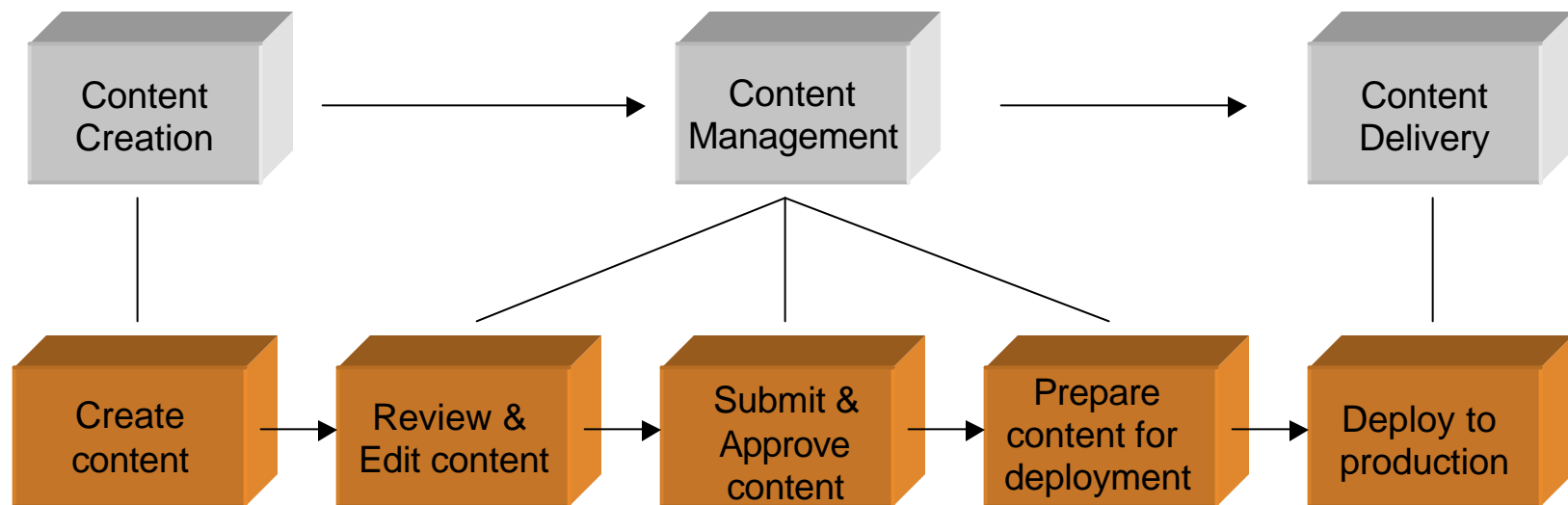




Content Management Basics

Workflow

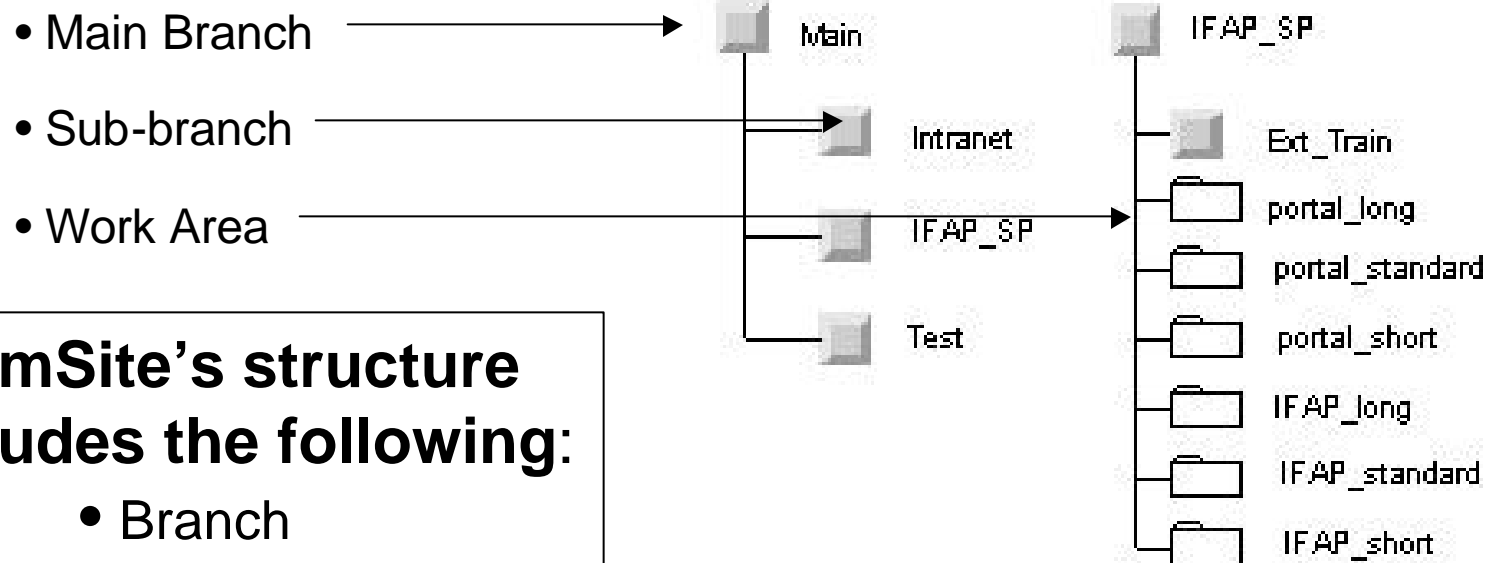
Basic workflow:





Content Management Basics

Structure



TeamSite's structure includes the following:

- Branch
- Sub-branch
- Work Area
- Staging Area
- Editions



Content Management Basics

Roles

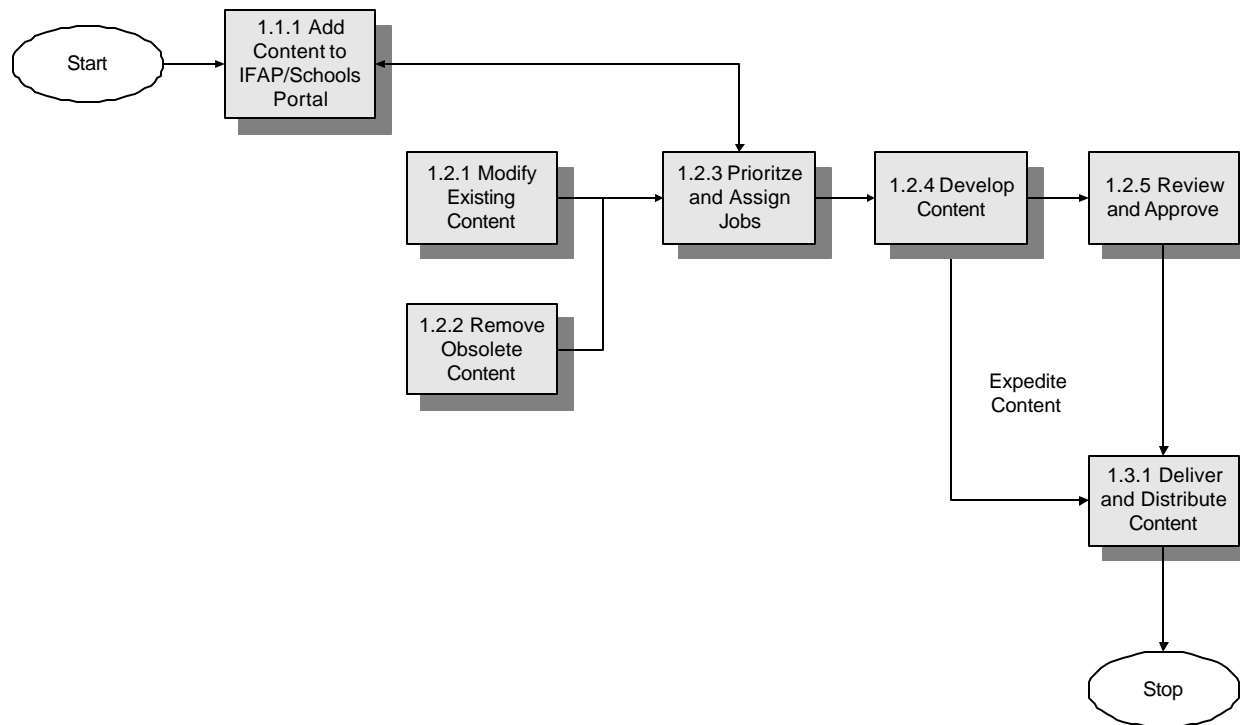
TeamSite has four major roles:

- Author
- Editor
- Administrator
- Master



The Content Management Process

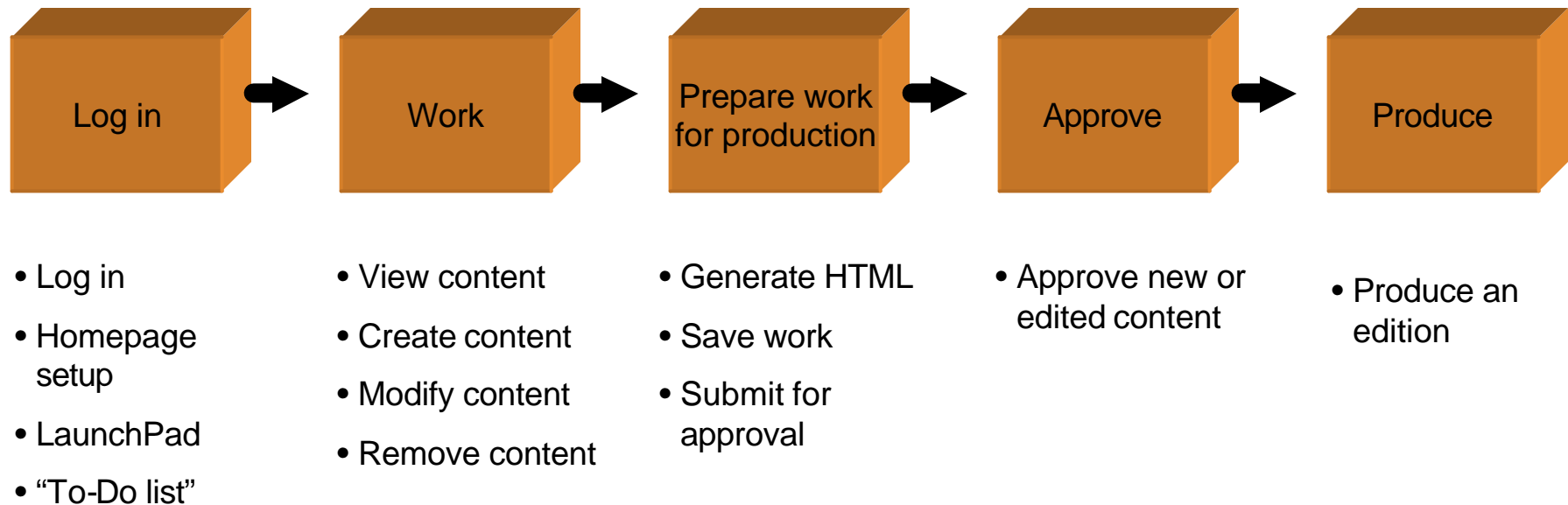
The process below shows how an idea for content gets published to either IFAP or the Schools Portal:





The Content Management Process

The basic, overall TeamSite cycle is shown below:





Using TeamSite

There are four main components to using TeamSite that correspond with our content management process:

- ↓ Logging in
- ↓ Completing work
- ↓ Submitting work for approval
- ↓ Producing editions



Using TeamSite

Logging In

Log In

- How to log in
- How to set up a homepage
- Installing LaunchPad
- Checking the “To Do” list for jobs / tasks

- ↓ Complete work
- ↓ Submit work for approval
- ↓ Produce editions



Accessing TeamSite: Logging in

To log into TeamSite, open your Internet browser and type in this address:

*<http://teamsiteservername/iw> **OR** <http://teamsiteservername/iw/launch.html>*

Enter your Login,
Username, and
Password in these
areas.

Then click "Login."

TeamSite - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites History Mail Print Discuss

Address <http://170.240.222.200/iw/stat.html> Go Links

Enter your Login, Username, and Password in these areas.

Then click "Login."

Login as: Author

Username: jwauthor

Password: jwauthor

Domain: CPI

Login

TeamSite Server: 170.240.222.200
Version: 4.2.0 Build 1405 Interwoven 20000322

Done Internet



Lesson #1

Accessing TeamSite:

Logging into TeamSite



What is LaunchPad?

- The first time you log into TeamSite, an application called “LaunchPad” installs automatically
- As you use TeamSite, LaunchPad allows you to specify which editing applications should launch which types of files in TeamSite
- You can specify how you want LaunchPad to interact with your workarea



One-Time LaunchPad Installation

To install LaunchPad:

Windows and Windows/NT users




- When you first log into TeamSite, LaunchPad will automatically download and install onto your computer

Mac users

- You must download LaunchPad before you can install it
- From the **Edit** menu, select **LaunchPad Setup**
- Follow instructions in the Install window



Setting the Home Page

-  The “Home Page” is the default screen you’ll go to each time you open TeamSite.
-  To set your workarea as your home page:
 - Go to your workarea (click on the “workarea” icon)
 - Select: **Edit > Set Homepage**
 - Your workarea is now your homepage
-  This same process can be done on any page to set it as your personal home page.



Setting the Home Page

Select:
Edit > Set Homepage

TeamSite - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites History Mail Print Discuss

Address http://170.248.222.200/iw/start.html Go Links »

cp1 author: CPI\vwauthor

File Edit View

Edit

Select All
Select All Files
Clear All

Set Homepage
LaunchPad Setup

Back Home

To Do List: Current Tasks

Job Name (ID): Author Assignment (15705) Job Options

Operation	Task Name (ID)	Description	Date	Owner	Status
Task Options	Author Work (15701)	Author Work	09/20/2000 14:32	CP1 vwauthor	Assigned To Me

Job Name (ID): Author Assignment (15706) Job Options

Operation	Task Name (ID)	Description	Date	Owner	Status
Task Options	Author Work (15706)	Author Work	09/20/2000 14:33	CP1 vwauthor	Assigned To Me

Job Name (ID): Author Assignment (16300) Job Options

Operation	Task Name (ID)	Description	Date	Owner	Status
Task Options	Author Work			CP1	Assigned

Logout

Internet



Jobs & Tasks

- ↓ While on your home page, you can check your To-Do list for tasks to which you are assigned.
- ↓ Tasks are portions of work performed by a single user. A job is a group of tasks associated with a particular workarea.
- ↓ We can:
 - 📄 Create a job
 - 📄 View a task
 - 📄 Add files to a task
 - 📄 Edit task files
 - 📄 Complete task
 - 📄 Approve task



Jobs & Tasks

- ↓ Our main use of jobs and tasks will be to:
 - 📄 View a task
 - 📄 Edit task files
 - 📄 Complete task
- ↓ To view what tasks you have pending, click the **To Do** button on your toolbar -- this takes you to the To Do list
- ↓ To perform a task, select: **Task Options > Start Task**
- ↓ Editing task files and completing a task may involve creating or modifying content -- these steps are explained later in this course



View of Tasks in the To-Do List

TeamSite - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites History Mail Print Discuss

Address <http://170.248.222.200/iw/start.html> Go Links >>

cp1 author: CP1\viwauthor

File Edit View

Back Home Refresh Workarea Select All Clear All

To Do List: Current Tasks

Job Name (ID): Author Assignment (15700) Job Options

Operation	Task Name (ID)	Description	Date	Owner	Status
Task Options	Author Work (15701)	Author Work	09/20/2000 14:32	CP1 viwauthor	Assigned To Me

Job Name (ID): Author Assignment (15705) Job Options

Operation	Task Name (ID)	Description	Date	Owner	Status
Task Options	Author Work (15706)	Author Work	09/20/2000 14:33	CP1 viwauthor	Assigned To Me

Job Name (ID): Author Assignment (16300) Job Options

Operation	Task Name (ID)	Description	Date	Owner	Status
	Author Work			CP1	Assigned

Logout

TEAM SITE

Internet



Demonstration

Viewing your work



Lesson #2

Viewing your work:
Checking your To-Do List



Using TeamSite

Completing Work

↓ Log in

 **Complete work**


- **View content**
- **Create / Add content**
- **Modify content**
- **Remove content**
- **Locked files**


↓ Submit work for approval

↓ Produce editions



Viewing Content

-  To view a file as it appears on the website:
- Click its underlined filename in a workarea, staging area, or edition
 - The file will appear in the new browser window

-  To view a read-only copy in an editing application:
- Click the checkbox next to the file
 - Click the **View File** button in the Button Bar
 - OR select **Edit > View File**



Creating Content with Templates

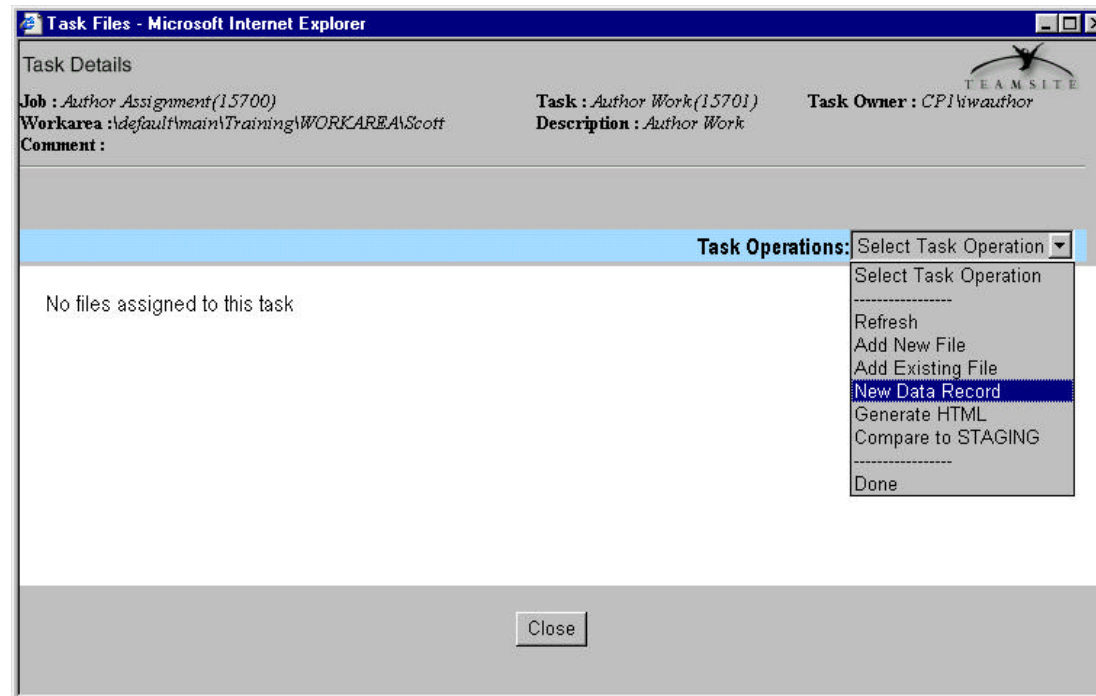
- Creating content involves using templates, similar to some commonly seen on websites, to enter information and files
- This is similar to completing a “form” in Lotus Notes as we do today to add content to the site
- Templates make creating content easy -- just fill in the required information, and your document is ready for the site
- The content created is called a “Data Record”



Creating Content With Templates

 To create a new data record using a template, first select your template:

- **File > Create New Data Record**





Creating Content With Templates



Then:

- Select: **Category/Type**
- In the Create New Record window, name the new file

Create New Data Record - Microsoft Internet Explorer

New Data Record

TEAM SITE

Select <input type="checkbox"/>	Category: ifap	Type: Reauthorization
Data Type: <input type="checkbox"/>	Category: ifap	Type: agencies
<input type="checkbox"/>	Category: ifap	Type: eannouncements
<input type="checkbox"/>	Category: ifap	Type: bbooks
<input type="checkbox"/>	Category: ifap	Type: guides
<input type="checkbox"/>	Category: ifap	Type: cbp materials
<input type="checkbox"/>	Category: ifap	Type: presentations

Data Record Name:



Creating Content

Then, complete the template:

- “Edit Data Content Record” window opens
- Fill in the appropriate information (required items are indicated with red asterisks)

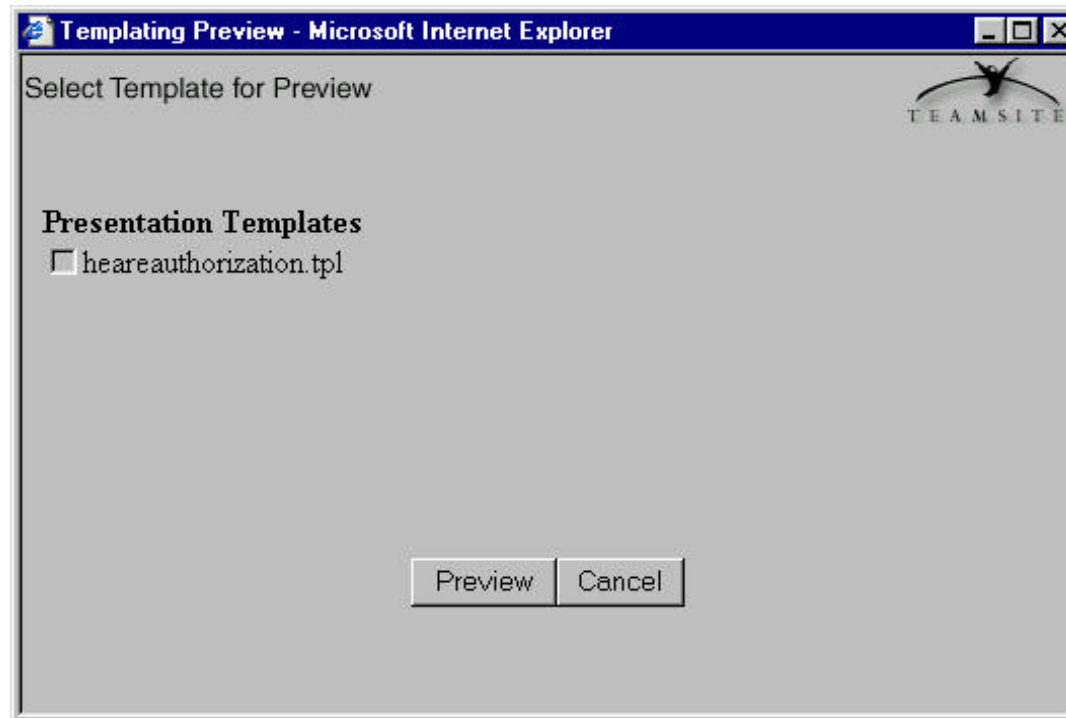
When you’re done, to view your new content entry:

- Select **Save & Preview**



Creating Content

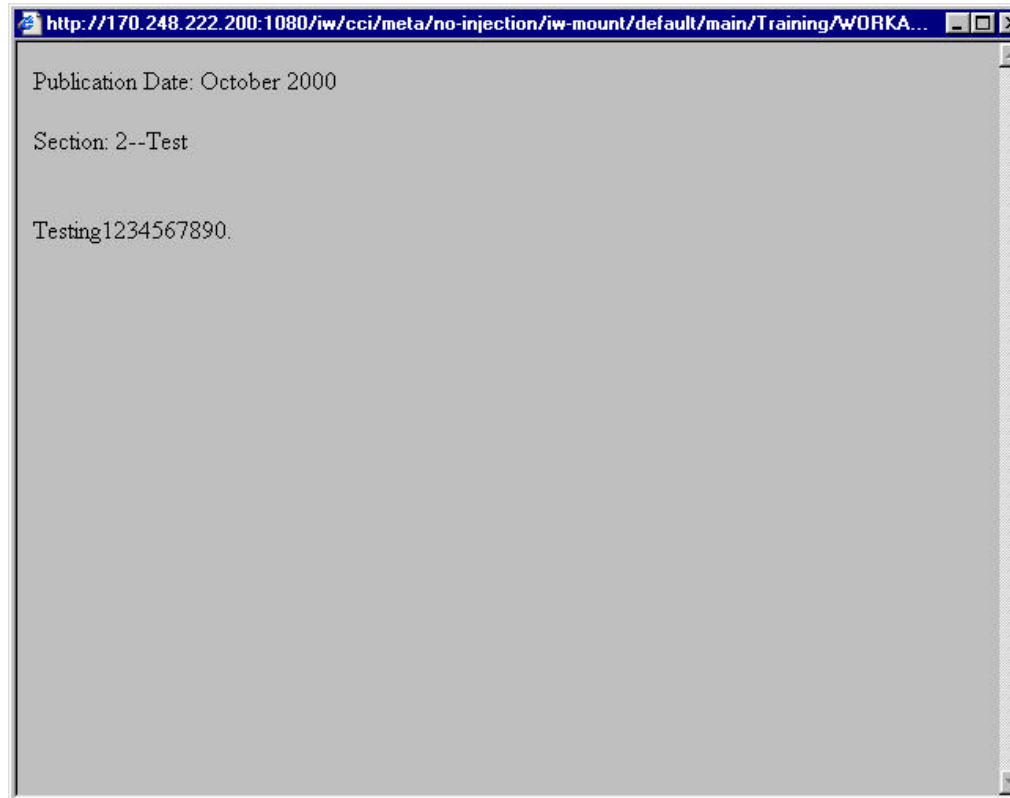
- Check the **Presentation Template** checkbox
- Click: **Preview**





Creating Content

 A copy of your document appears to preview

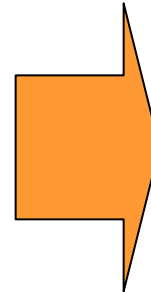
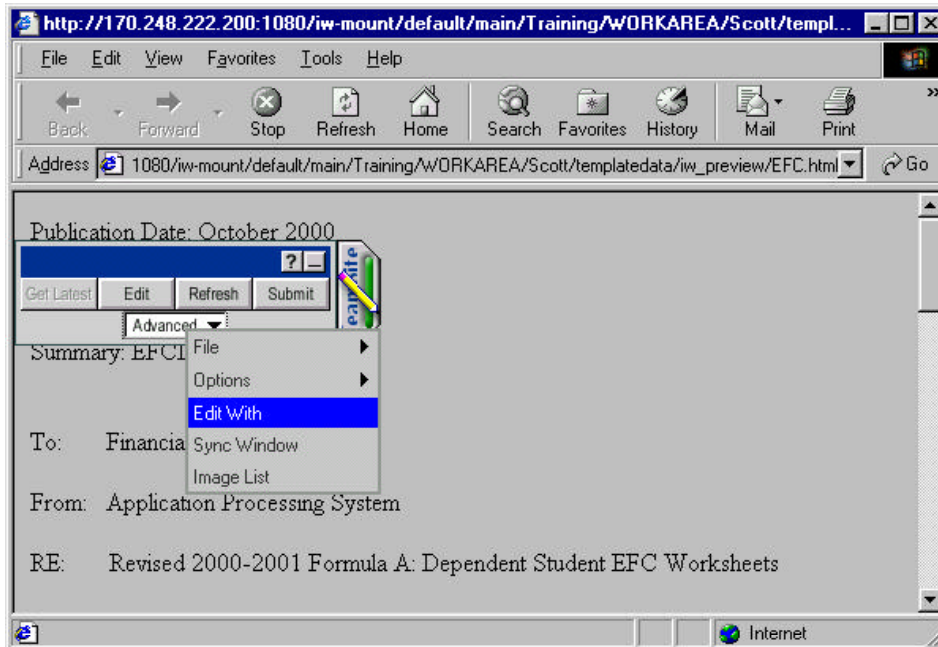




Creating Content

When entering text with formatting (such as bold, italics, or indentation), create the new data record without the main body of text

- After selecting **Save & Generate**, open **SmartContext Edit**
- Select: **Advanced > Edit With**
- Select: **WORD (WINWORD)**



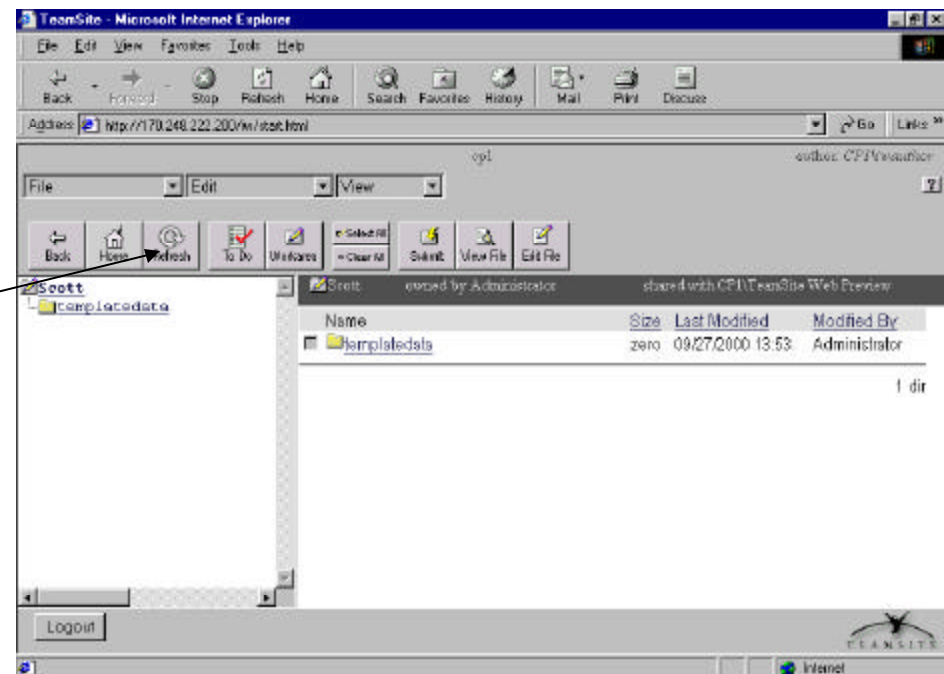


Creating Content

 When you've edited the file:

- Select: **SAVE** (using the save icon in Word)
- Close Word
- Click: **Refresh**

Refresh button





Demonstration

Adding content to IFAP / Schools Portal



Lesson #3

Adding content to IFAP / Schools Portal:

Creating a new data record



Lesson #4

Adding content to IFAP / Schools Portal:

Generating HTML





Lesson #5

Adding content to IFAP / Schools Portal:

Posting your files to IFAP / Schools Portal



Modifying / Removing Files

-  Modifying/removing content
-  Regenerating HTML



Modifying Files with SmartContext Editing

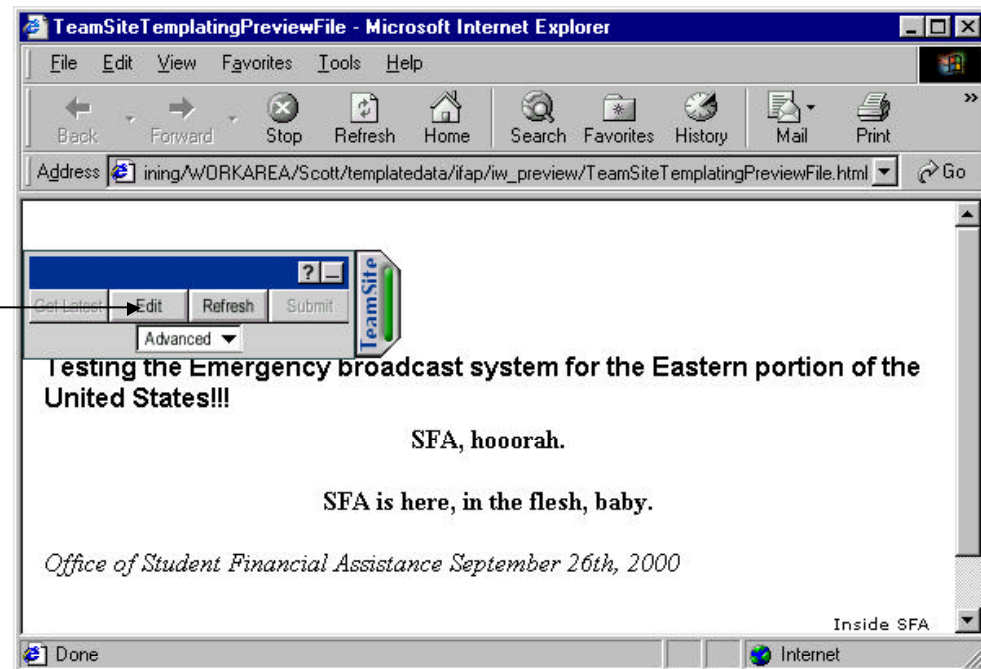
 You can browse the website and edit pages as you view them through SmartContext Editing

 The SmartContext Editing Tab looks like this:

This is the SmartContext Editing Tab.

To make changes using the template, click: **Edit**

To make changes with formatting, select: **Advanced > Edit With**



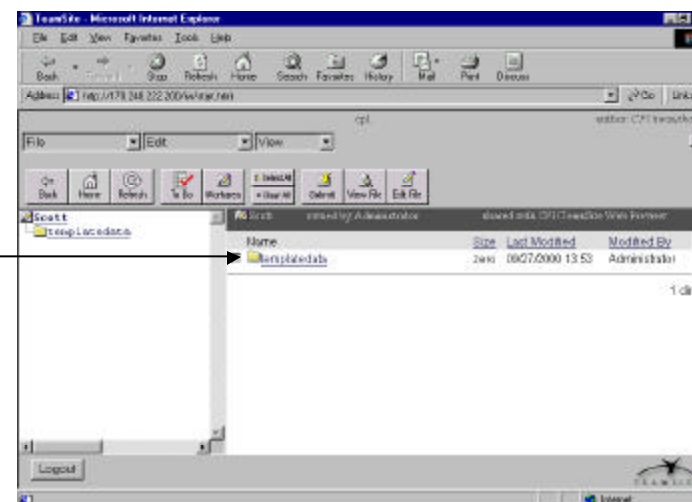


Modifying Files with SmartContext Editing

 To modify the file:

- Click the name of a file in the Work Window or a Task Details window in the TeamSite GUI -- the file will open in a new browser window containing the TeamSite SmartContext Editing Tab
- Navigate through the website by clicking links until you reach the page you want to edit
- When you reach the page you want to edit, click the SmartContext Editing Tab so that it opens

Select a file here

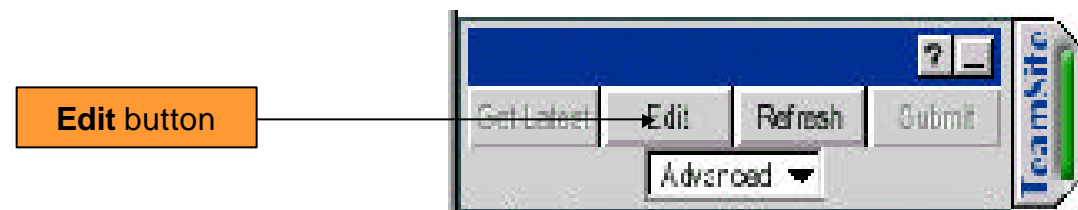




Modifying Files with SmartContext Editing

 With the SmartContext Editing Tab open:

- Click the **Edit** button on the tab -- this opens the file in your usual editing application (such as Word)
- Edit the file as you normally would, saving it when you have completed your work
- To see the changes you made, return to the SmartContext Editing window and click the **Refresh** button on the tab -- your changes will be uploaded for you to view





Demonstration

Modifying Files using SmartContext Editing



Lesson #6

Modifying Files using SmartContext Editing: *Editing Files*



Basic Locking Concepts

- Files “lock” in TeamSite to limit conflicts if multiple users work on the same documents
- There are three types of locks that control how multiple users work concurrently:
 - Submit Lock
 - Mandatory Lock
 - Optional Write Lock
- When making edits, a warning will appear if a file is locked
- Our team will use the **Submit Lock**



Locked Files

- Locked files are marked with a lock icon (display icon)
- To determine who owns a lock, use:
File > File Properties

TeamSite - Microsoft Internet Explorer

Address: http://170.248.222.200/iw/start.html

cp1 editor: CP1\iweditor

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites History Mail Print Discuss

File Edit View

Back Home Refresh To Do Workarea Select All Clear All Submit View File Edit File

List of locks in branch: "Training"

Name	Workarea	Created	Owner
<input type="checkbox"/> anotherfile.txt	Scott	09/26/2000 13:15	CP1\iweditor
Path: \templatedata\ifap\dpcoletters\attachments\ Locked by launching edit.			
<input type="checkbox"/> newfile.txt	Scott	09/26/2000 13:18	CP1\iweditor
Path: \templatedata\ifap\dpcoletters\attachments\ Locked by launching edit.			
<input checked="" type="checkbox"/> TeamSiteTemplatingPreviewFile.html	Scott	09/27/2000 13:26	CP1\iwaauthor
Path: \templatedata\ifap\iw_preview\ Locked by launching edit.			




Logout

TEAM SITE

Internet



Unlocking Files

-  View the list of locked files in your workarea through: **View > List Locks**
-  Files are unlocked when they are submitted to the staging area
-  To manually unlock a file, use: **Edit > Unlock**




Using TeamSite

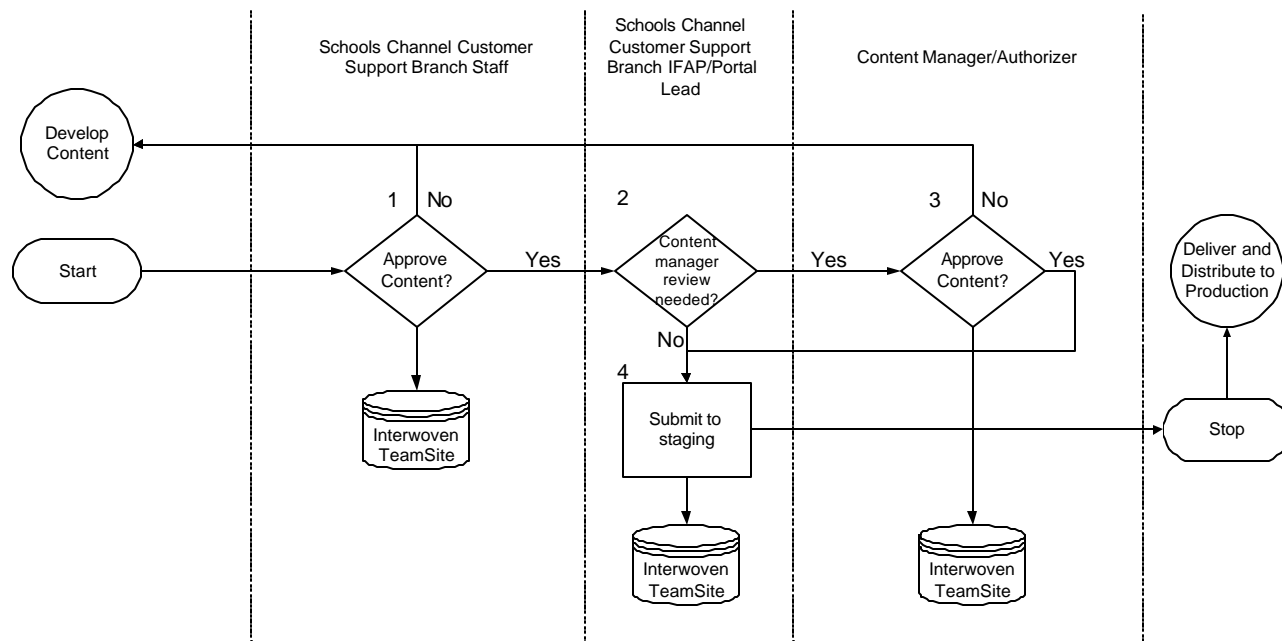
Submitting Work for Approval

- ↓ Log in
- ↓ Complete work
- 📄 **Submit work**
 - **Process for submission**
- ↓ Approve work
- ↓ Produce editions



Submitting Work for Approval

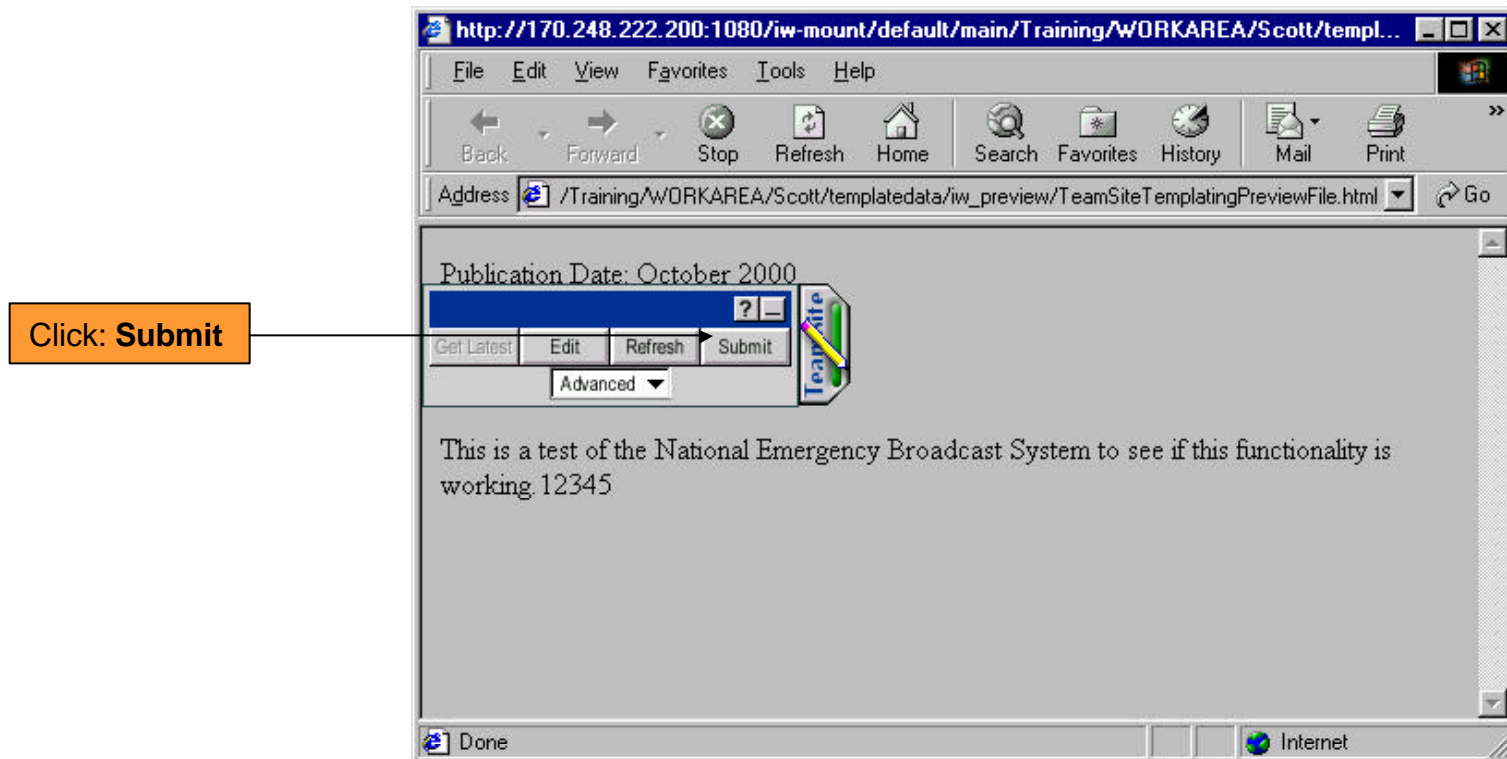
 When work is submitted, it goes through the approval process. The approval process includes these steps:





Submitting Work with SmartContext Editing

 When in SmartContext Editing, clicking the **Submit** button starts the submission process in TeamSite





Demonstration

Submitting work for approval / to staging



Lesson #7

Submitting work for approval / to staging:

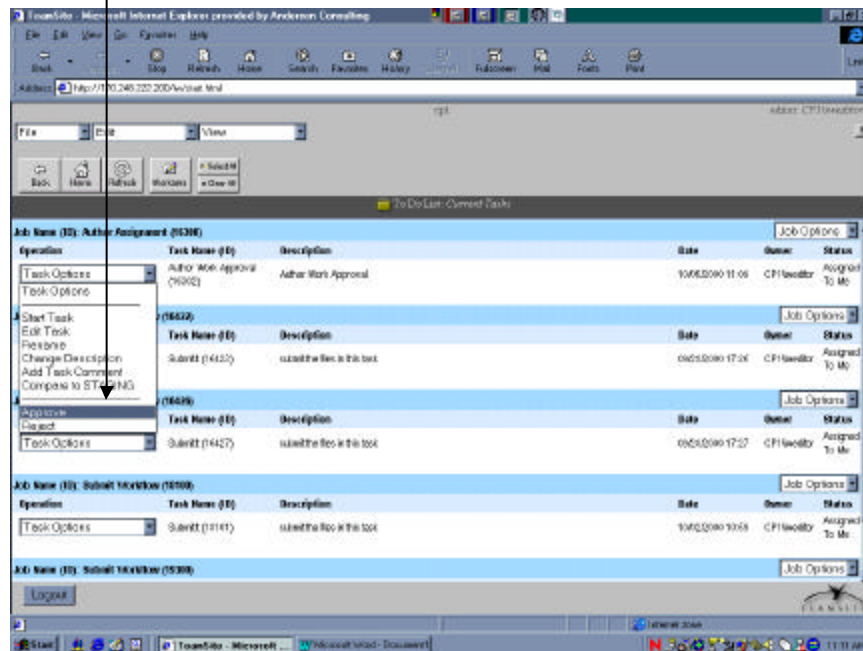
Submitting work from the SmartContext Tab



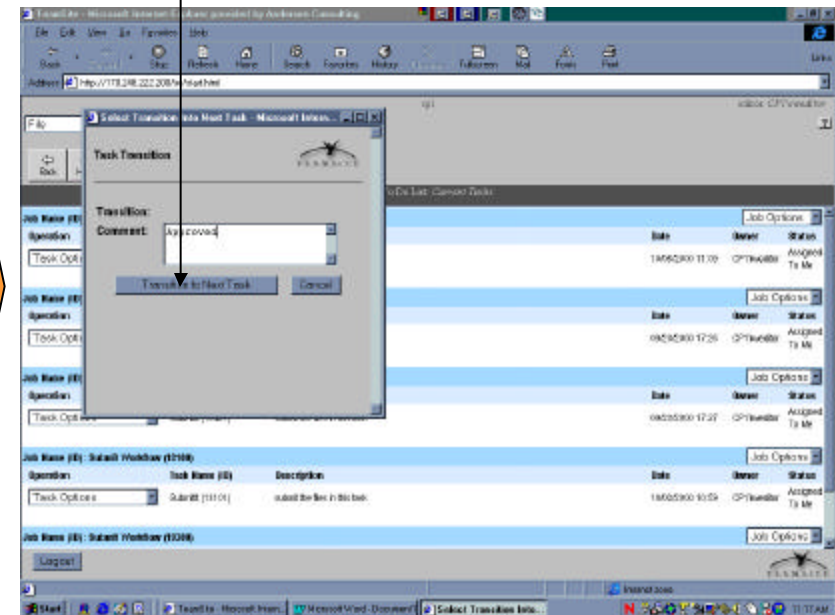
How to Approve Content

 **Within TeamSite, to approve work:**

Select: **Task Options > Approve**



Enter transition comments and click: **Transition to Next Task**





Using TeamSite

- ↓ Log in
- ↓ Complete work
- ↓ Submit work for approval
- 📄 **Produce editions**
 - **How to produce an edition**



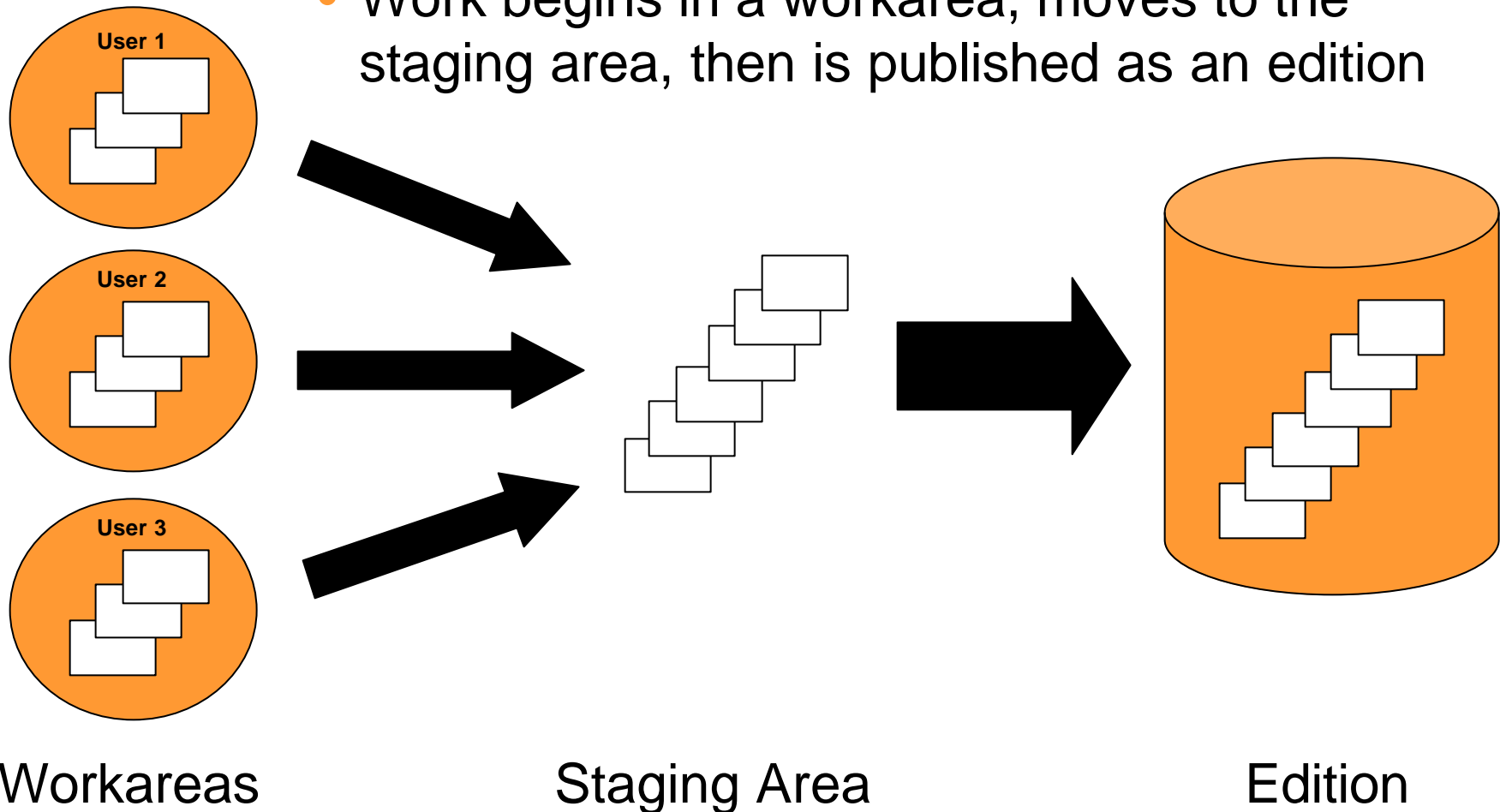
Publishing Editions

- 📄 When all work in the staging area is ready for the website, we publish an edition
- 📄 This may happen on a regularly scheduled basis or as updates are needed
- 📄 Editions are saved like archives, in case we need to revert back to a previous version
- 📄 Once an edition is published, we start work on the next edition
- 📄 Selecting the “**Get Latest**” button each time you log into TeamSite ensures that your workarea has the most recent edition loaded



Publishing Editions

- Work begins in a workarea, moves to the staging area, then is published as an edition





Review & Conclusion

Review

- Content Management Basics
- The Content Management Process
- Using Interwoven TeamSite

Questions

Conclusion